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## Introduction

CalFile was developed in 2003, to provide taxpayers with a free, secure, and direct online application to e-file their state income tax return. Per survey responses, the most common reasons for using CalFile are:

- It's fast.
- It's free.
- It's convenient.

CalFile is a quick online process, which takes about 15-30 minutes to complete. CalFile eases the filing burden for taxpayers by guiding them through an easy question and answer process. To access CalFile, the taxpayer only needs to provide SSN and last name. Taxpayers can e-file their tax return using CalFile from January 4, 2010, through October 15, 2010.

CalFile has grown in popularity by nearly 110 percent since its first full filing season. In 2004, nearly 110,000 CalFile returns were filed, and in 2009, over 229,000 CalFile returns were filed. CalFile is available to more than 6 million taxpayers.

For more information, go to [ftb.ca.gov](http://ftb.ca.gov) and search CalFile.

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## Eligibility

Generally, CalFile is available to taxpayers who:

- Are filing a 2009 California personal income tax return.
- Use any filing status.
- Were a California resident all year in 2009.
- Claim standard and itemized deductions.
- Claim up to 10 dependents.
- Have a federal Adjusted Gross Income (AGI) up to:
  - \$160,739 for single and married/registered domestic partners (RDP) filing separately.
  - \$241,113 for head of household.
  - \$321,483 for married/RDP filing jointly and qualifying widow(er).

CalFile is available to all 540 2EZ and 540A filers, and some 540 filers. CalFile accepts income of up to \$321,483, itemized deductions, and the following tax credits:

- Personal exemption credit.
- Senior exemption credit.
- Blind exemption credit.
- Dependent exemption credit.
- Nonrefundable renter's credit.
- Child and dependent care expenses credit.

For more information, refer to the [CalFile qualifications](#).

CalFile is not available to taxpayers who:

- Are filing a 2009 return on behalf of a person who died.
- Are requesting a military-related or disaster-related extension.
- Need to claim a disaster loss.
- Have business or farming income or loss.
- Have capital gains or losses.
- Have income or loss from rental real estate, royalties, partnerships, S-corporations, estates, trusts, REMICs, etc. (federal Schedule E).

For more information, refer to the [CalFile exceptions](#).

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## Benefits

- Free.
- Fast.
- Easy.
- Convenient.
- Direct-to-government e-filing option.
- Refunds usually in less than one week with direct deposit.
- File now and pay later options.\*
- Takes about 15-30 minutes to complete.
- Instant confirmation that we received their return.
- Available 24 hours a day, seven days a week.

\* Taxpayers can file their return and schedule their payment to be deducted from their bank account at a later date. For example, they can file their return now, and schedule their payment to be made April 15. Or, the taxpayer can return to our website and use **Web Pay** to make a payment after they use CalFile to e-file their return.

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## FAQs

### How much do taxpayers pay to use CalFile?

Nothing. CalFile is free e-file for all taxpayers who qualify to use it.

### Do taxpayers need to know what form to use?

Taxpayers do not need to know which form to use with CalFile; they only need to verify that they meet the CalFile qualifications. CalFile guides taxpayers to answer basic questions and CalFile automatically completes their state tax return. For more information, refer to [CalFile qualifications](#).

### What software is required to use CalFile?

- Adobe Reader (version 7.0 or higher) to view and print the return. They can download the latest version of Adobe Reader for free from [Adobe](#).
- A [compatible browser and operating system](#).

### If taxpayers owe money can they use CalFile?

Yes. Taxpayers who use CalFile and owe money, can choose to send the payment electronically with their return. They can e-file their return now, and schedule their electronic payment for a later date. The taxpayer can also visit our website and use [Web Pay](#) to make a payment after they use CalFile to e-file their return, or pay by check or credit card. Taxpayers can review all of these options on the [Refund or Payments](#) page within CalFile.

### Can taxpayers use CalFile if their last name changed in 2009?

Yes. However, if a taxpayer's last name changed in 2009, they need to enter the last name they used on their 2008 tax return to access CalFile. Then they need to enter their new last name on the [Name and Address](#) page in CalFile.

Taxpayers who have not previously filed a California tax return need to call our Taxpayer Services Center. When they call, they need to provide either their California driver's license or California identification number. Please call:

- From within the United States: 800.353.9032.
- From outside the United States: 916.845.6600 (*not toll-free*).

**Assistance for Persons with Disabilities:** We comply with the Americans with Disabilities Act. Persons with hearing or speech impairments, please call TTY/TDD 800.822.6268.

[More FAQs on our website](#)

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## Statistics and Feedback

### Statistics for Tax Year 2008

- Over 229,000 returns filed using CalFile (**18% growth** from previous year).
- Projections: 250,000 for tax year 2009; 270,000 for tax year 2010.
- CalFile and ReadyReturn\* are the **fastest growing products** for do-it-yourself e-file.
- They made up 12% of all do-it-yourself e-file returns through July 2009.

### CalFile user feedback for Tax Year 2008

- **99%** stated they were satisfied with CalFile.
- **98%** stated they would use it again.
- **84%** stated they chose CalFile because it was free.
- **57%** chose CalFile because their return goes directly to FTB.

### Program Costs

- Annual Maintenance: \$125,000
- Average Cost to Process a CalFile Return: **\$0.34**
- Average Cost to Process a Paper Return: **\$2.59**
- CalFile is expected to produce a net savings in 09/10:

Cost to Process if Filed on Paper (250,000 x \$2.59)	\$647,500
Cost to Process CalFile Returns (250,000 x \$0.34)	\$85,000
<b>Estimated Cost Savings/Avoidance</b>	<b>\$562,500</b>
Projected 09/10 CalFile Maintenance Costs	\$125,000
<b>Net Savings to State Due to CalFile</b>	<b>\$437,500</b>

\* ReadyReturn is FTB's free, direct-to-government online filing option that uses information the state already has to pre-fill a state income tax return for eligible taxpayers.

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## Testimonials

*"If I had known about Calfile, I would have used it last year. I'll be a regular user from now on."*

*"I was very pleased with the CalFile interface. It is very user friendly and convenient."*

*"This is great customer service. Thanks for the e-filing availability."*

*"I have always e-filed my returns but have never used an easier or quicker one than CalFile. It was great. I would recommend this to anyone."*

*"This is the second year I have been using your system... I am not computer savvy and your system is idiot-proof. THANKS."*

*"Love It! The best thing the State of California has done."*

*"I would like to thank the persons who developed this program and those who keep it up to date. This site is so easy to move around and so fast to complete. I will recommend this to everyone I know. Thank you so much for having this here. Please send out some PR so others know about the site."*

*"It's great and easy."*

*"I am very pleased with the speed and convenience of CalFile. It is so easy, I will always file my return online with CalFile."*

*"I hope California continues to have CalFile."*

*"Thank you so much for making this tool available to us. It is quick, accurate and convenient. I would imagine it's a great cost savings to the state as well. Good job guys!"*

*"Worked like a dream as it does every year. Thanks."*

*"WOW! Excellence personified."*

*"Excellent service. No one has an excuse to not file...it's too easy."*

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## Article

*Available to copy and use in your newsletter, publication, or website.*

### Franchise Tax Board's CalFile Saves Time

*Complete Your California Tax Return Online in Minutes*

CalFile is **FREE** and guides you to answer basic questions to complete and e-file your tax return. You provide the information and CalFile does the calculations for you.

CalFile's convenient features and benefits include file now and pay later options, instant confirmation that we received your return, and refunds in less than one week with direct deposit. CalFile is available 24 hours a day, seven days a week.

"All the figures are calculated for me and the process is fast and free," said a taxpayer returning to CalFile this year. CalFile simply eases the filing burden for taxpayers by guiding them through an easy question and answer process. Taxpayers do not need to know which tax form to file to use CalFile, they only need to verify that they meet the CalFile qualifications.

More than 6 million Californians can save time and e-file their tax returns using CalFile from January 4, 2010, through October 15, 2010. Go to **ftb.ca.gov** and search for **CalFile**.

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## Logos | Leaflet

- Click on the links below to open different variations of the CalFile logo.

- Low Resolution (for web) - jpeg file

[Color CalFile Logo](#)

[Black and White CalFile Logo](#)

- High Resolution - jpeg file

[Color CalFile Logo](#)

[Black and White CalFile Logo](#)

- Click on the link below to open the CalFile Leaflet (PDF).

[CalFile Leaflet \(4.25" x 5.25"\)](#)

Suggested leaflet placement may include the following:

- In front of your own business.
- Company bulletin boards of friends and family.
- School or daycare offices and lunchrooms.
- Senior recreational facilities and retirement homes.
- Fraternities, sororities, and dormitories (in the community area, hallways, and bathrooms).
- Church bulletin boards.
- Apartment/condominium buildings (in laundry and recreation rooms).
- Community activity and learning centers.
- Grocery stores.
- Car washes.
- Laundromats.
- Hotel and motel lobbies.
- Military cafeterias and recreation centers.
- Counters of public places.
- Meeting convention centers and rooms.
- Libraries.
- Union halls.
- Chambers of Commerce.
- Medical or professional offices.
- Waiting rooms at auto repair and tire shops.
- Liquor and convenience stores.
- Tourist information centers.

Please obtain appropriate permission before posting.



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## Videos

Click on the links below to open the CalFile videos (links to our YouTube page).

[CalFile](#)

[CalFile Drawing](#)

[CalFile Beats Paper \(HD\)](#)

To see other videos, visit our [Franchise Tax Board YouTube](#) page.

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Website

[ftb.ca.gov](http://ftb.ca.gov)

Toll-Free Automated Phone

800.338.0505

### Assistance for Persons with Disabilities

We comply with the Americans with Disabilities Act. Persons with hearing or speech impairments, please call TTY/TDD 800.822.6268.

### Public Affairs Office

The Public Affairs Office responds to all media contacts. Members of the media can contact the Public Affairs Office at 916.845.4800 or [publicaffairsoffice@ftb.ca.gov](mailto:publicaffairsoffice@ftb.ca.gov).